

Shop Healthy Iowa Toolkit

Increasing Healthy Food Access in Iowa





Table of Contents

I. Program Summary	4
Summary.....	5
Overview.....	6
Goals and Objectives.....	7
Planning.....	8
Logic Model	9
Communication and Organizational Chart.....	10
Duties & Expectations.....	11
II. Working with Latinos in Iowa.....	12
Cultural Humility Overview.....	13
Cultural Humility vs Cultural Competency.....	16
Defining relationships.....	17
Steps for Establishing Relationships & Building Trust.....	18
III. Economic Development.....	20
Working with local business associations	21
Marketing and Promotion Capacity of Stores.....	22
Programs Assistance.....	23
Applying for SNAP benefits as a grocery store.....	24
IV. Program Implementation	26
Program Outline and Timeline.....	27
Store Recruitment.....	28
Pre-Assessments.....	29
Store Training Summary.....	31

Implementation Plan.....	32
Shop Healthy Iowa At-A-Glance Table.....	35
V. Monitoring & Evaluation	36
What is Evaluation.....	37
Why Evaluate SHI	39
Process Evaluation SHI.....	40
Outcome Evaluation SHI.....	44
Impact Evaluation SHI.....	46
Summary of the SHI Evaluation Program.....	47
VI. Acknowledgements.....	48
VII. References.....	49
VIII. Appendices.....	51
A. Example of a Store Order Form, Store Recruitment Flyer, Store Commitment Form	
B. Latino NEMS-S Example Reports	
C. Manager Interview and Manager Training Survey	
D. Customer Survey	
E. Purchasing Data Collection Agreement Form	
F. English Store Training Guide	
G. Spanish Store Training Guide	
H. Program Calendar	
I. Recommended Samples of Healthy Recipes	
J. Food Demonstration Log	
K. Action Plan	
L. Evaluation Checklists	
M. Additional Resources	



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I. Program Summary





Summary

The Shop Healthy Iowa (SHI) toolkit was designed to guide local public health agencies or other community contractors in improving local food environments for predominately Hispanic/Latino populations. The Iowa Department of Public Health and the University of Iowa-College of Public Health, along with Iowa SNAP-Ed, Iowa State University (ISU), and ISU Extension and Outreach, have collaborated to create a healthy retail program. The goal of SHI is to increase the promotion and purchase of healthy foods among Latino customers while a) establishing strong partnerships with local and state stakeholders, and b) disseminating evidence-based strategies to promote healthy foods in Latino retail food stores.





Overview

Proper nutrition is crucial for growth and development, and it reduces the risk for many chronic health conditions including, but not limited to: overweight and obesity, anemia, malnutrition, heart disease, oral disease, type 2 diabetes, high blood pressure, osteoporosis, and some cancers.¹ The majority of these adverse health outcomes are highly correlated with being overweight and obesity, and are largely preventable through healthy diet and lifestyle. Astoundingly, only 28.9% of American adults were considered to be at a healthy weight in 2011-2014.¹ There are vast disparities in access to affordable, healthy foods across minority groups, income levels, and between urban and rural communities.² On average, rural residents eat fewer vegetables and fruits than suburban or urban inhabitants.²

Additionally, Latino and rural communities tend to have a higher risk for chronic diseases that are related to nutrition.² In the United States, obesity prevalence among urban adults is 33.4%, compared to 39.6% among rural adults.² Only 21.2% of Latino adults are at a healthy weight.¹ In addition to the factors mentioned above, income levels can influence nutrition. Research published in the Journal of the American Medical Association (JAMA) in 2014 concluded diet quality and socioeconomic status are positively associated

with one another.³ In other words, individuals with lower socioeconomic status are more likely to have poor diet quality. The study also revealed the disparity has grown over time.

Iowa, a predominantly rural state, is not immune to these trends. Improving the food environment in rural, low-income, Latino communities in Iowa is a promising approach for decreasing current health-related inequities and improving overall population health. According to the 2015 Behavioral Risk Factor Surveillance System (BRFSS), 33.7% of adult Hispanics/Latinos reported consuming fruit less than once a day and 21.5% reported consuming vegetables less than once a day.^{4,5} Hispanics drink regular soda more than 4 times per week and sugar-sweetened fruit drinks almost 3 times per week.⁴ An intervention designed to increase access to fruits, vegetables, and non-sugary beverages in Latino stores in Iowa has the potential to improve dietary behaviors among Latino residents. By recognizing and addressing the unique barriers that local communities face, we can improve population health.



Goals and Objectives

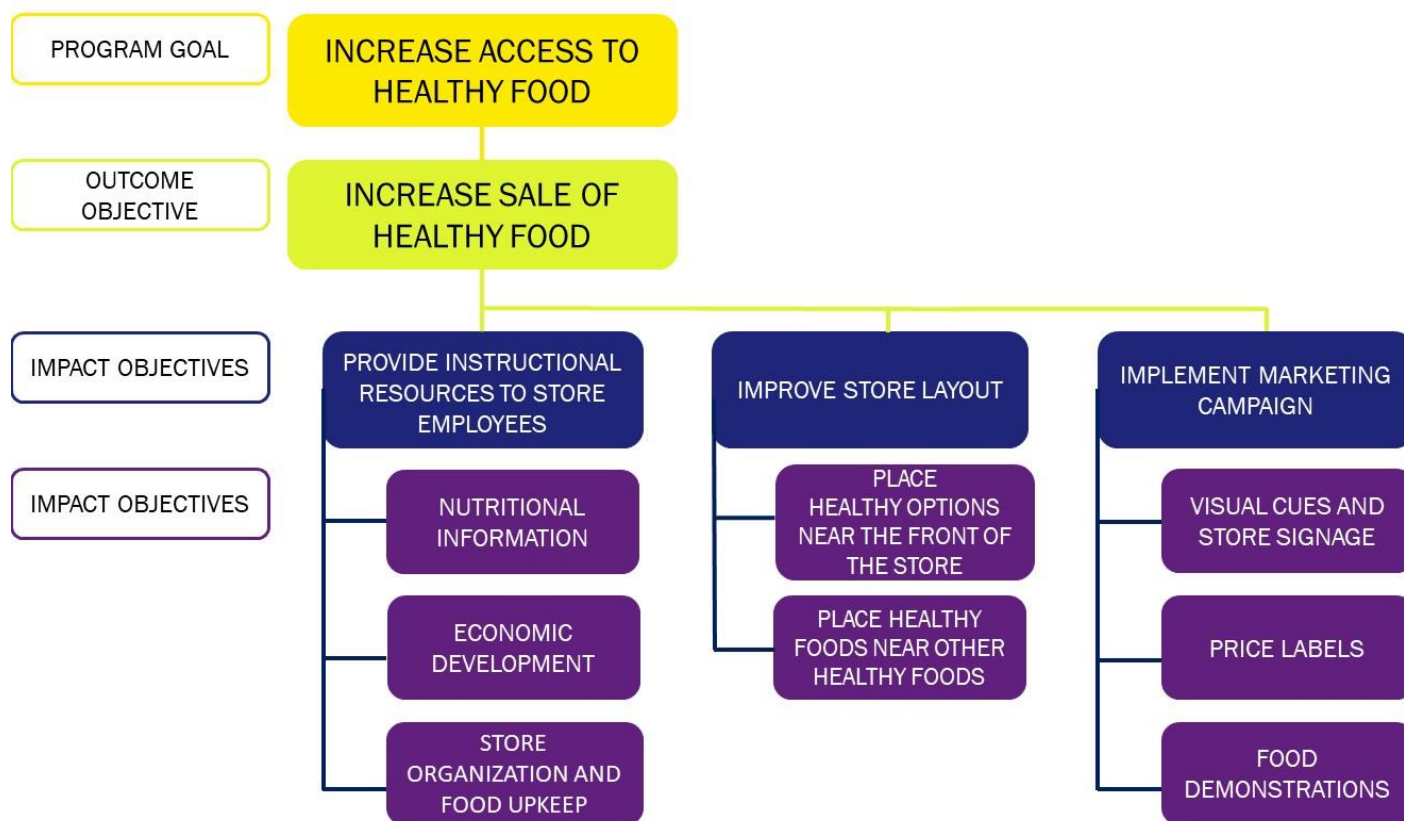


Figure 1 –SHI Program Goals and Objectives

As outlined in Figure 1, the goal of the Shop Healthy Iowa (SHI) program is to increase access to fruits and vegetables and non-sugary beverages in Iowa. An increase in produce sales of the targeted Latino retail food stores is expected by the end of the program's implementation period. A three pronged approach is used to achieve this increase:

- 1) **Provision of instructional resources to store employees.** The provision of instructional resources will enhance store managers' ability to successfully implement and sustain store-wide structural changes. Program actions to promote this objective include supplying basic nutritional information to stores, facilitating customer purchasing of healthy foods through improved environmental placement of produce and non-sugary beverages, and training the store managers on best practices for store organization.
- 2) **Improvements in the stores' layouts.** The store layout will be improved by developing and sustaining store-wide structural changes promoting healthy retail such as placing produce and non-sugary beverages toward the front of the stores and discussing alternative placement of produce and non-sugary beverages with store managers.
- 3) **Implementation of a fruit and vegetable marketing campaign.** A marketing campaign used to support customer purchasing of produce and non-sugary beverages will also take place through the insertion of price labels for produce and non-sugary beverages and the addition of visual cues to draw customer attention to healthy foods and their benefits.

Planning for Shop Healthy Iowa (SHI)

The SHI project goal and all relevant outcome and impact objectives were developed through a careful review of existing literature, community surveillance data, in-store assessments, and partnerships with the Iowa Department of Public Health and the owners of the three retail stores that participated in the pilot tested versions of this program. The Social Cognitive Theory was used as a theoretical basis for project goals, objectives, and activities. Additionally, the SMART model was used to develop a marketing campaign, which aims to increase customer self-efficacy and knowledge relating to availability of healthy food options. Each strategy included in this toolkit is evidence-based and recommended by the CDC.⁶

Previous studies have shown that a combination of structural changes, social marketing, and education may be the most promising approach to increasing sales of healthy foods in small retail venues located in underserved areas.^{7,8,9} Structural changes help build customer awareness and increase visibility of available healthy food options. In past studies, increased visibility and improved appearance of a product have resulted in increased sales.⁸

A social marketing approach, utilizing the four P's (product, price, placement, and promotion), can be used to maximize the effect of store-wide structural changes, bringing increased customer awareness of healthy food options.

Educational materials provided to store managers/employees targeting behavioral capability and self-efficacy increases employees' abilities to stock and promote healthy food options. The Social Cognitive Theory emphasizes the concept of reciprocal determinism; the idea that an individual's behavior is both influenced by and influences external social and environmental factors.¹⁰ The environmental, behavioral, and training activities in this intervention will interact to increase both supply of and demand for healthy foods in participating stores. Increasing healthy food purchases in participating stores will benefit customers through improved dietary habits, and will also benefit stores by increasing profits. The relationship between each intervention component is outlined in the logic model below (Figure 2).



Logic Model

Inputs	Activities	Outputs	Outcomes	Impact
Community contractor	Nutritional education	↑ employee knowledge	↑ promotion of healthy items	↑ sales of healthy items
Training space	Best practices in healthy retail	↑ employee self-efficacy	↑ store layout changes to facilitate healthy food purchases	
Training materials (English & Spanish versions)	Moving healthy items near one another	↑ influence of product cues		
Time	Relocation of produce to the front of the store	↑ visibility of healthy foods		
Marketing material	Adding price labels	↑ price awareness		
Funding for materials, personnel, and incentives	Adding visual cues directing customers to healthier items	↑ customer awareness of healthy in store items		

Figure 2 – SHI Program Logic Model



Communication and Organizational Chart

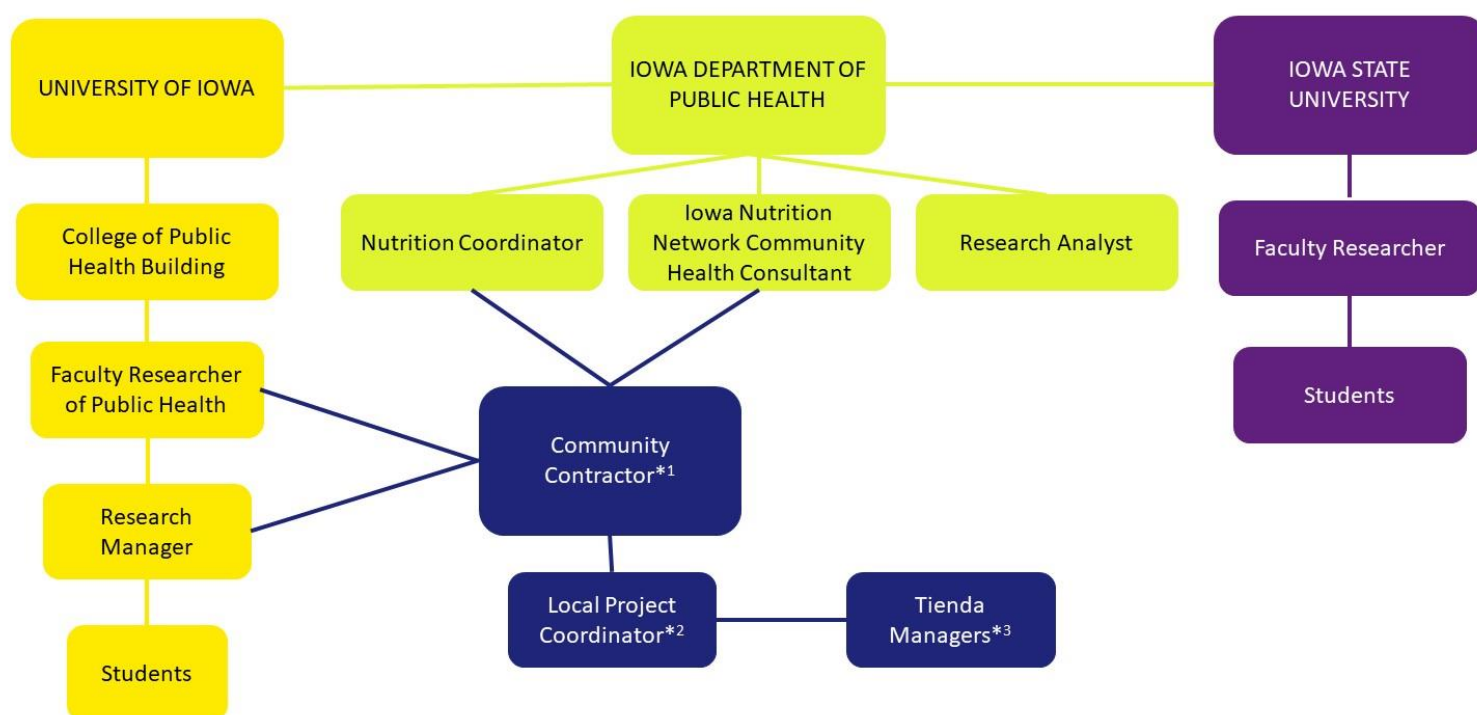


Figure 3 – SHI Program Communication and Organizational Chart

***1 Community Contractor:** Community organization that is contracted to assist with implementation of the SHI program (ex: Iowa State Extension)

***2 Local Project Coordinator (LPC):** Employees of the contracted community organizations that implement the SHI program (i.e. main contact person for the stores, train store managers, and assist with strategizing of stores' structural and marketing changes)

***3 Tienda Managers:** Managers of chosen stores within target communities that meet program eligibility criteria and agree to participate in the SHI program



Duties and Expectations

IDPH

- ☐ Project Coordination
- ☐ Fiscal management
- ☐ Marketing item development and coordination

University of Iowa

- ☐ Overall technical assistance
- ☐ Assessment and evaluations
- ☐ Consultation on research methods

Iowa State University

- ☐ Development and testing of the Latino NEMS-S evaluation tool

Community Contractor and Local Projector Coordinator

- ☐ Main contact with stores
- ☐ Implementation of SHI
- ☐ Completion of assigned SHI evaluation components
- ☐ Refer to contract language for detailed descriptions

** Further details and descriptions of the activities concerned with these duties and expectation can be found in the implementation and evaluation sections of this document.



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II. Working with Latinos in Iowa





Cultural Humility Overview

Definition of Cultural Humility¹¹

“... Incorporates a lifelong commitment to self-evaluation and critique, to redressing power imbalances [...], and to developing mutually beneficial and non-paternalistic partnerships with communities on behalf of individuals and defined populations.”

- Drs. Tervalon and Murray-Garcia, 1998

When working with people from cultures and backgrounds different from ours, misunderstandings, false assumptions, and communication issues can arise. Therefore, it is important for us to be aware of our assumptions and how they might impact us as we work with others.

Cultural humility also recognizes that we are not experts in others' cultures.



Within this view, individuals or community groups are upheld as the experts and teachers of their culture. When working with those from cultures that are different from our own, we must recognize that we have to play the role of a student to learn another's culture and what is culturally appropriate.

Self-Evaluation & Critique

Self-evaluation and critique is about examining and recognizing our personal assumptions and beliefs—understanding what you assume about others based on their culture. What do you expect them to be like based on the way they look, based on where they say they are from, et cetera.

As you work on self-evaluation, here are some questions you can ask yourself:

- ☐ What are my familial and cultural values and beliefs?¹²
- ☐ How do I define my personal culture/identity?¹² (This can be in terms of religion, ethnicity, education, age, SES, experience, gender, cultural practices, sexual orientation, or whatever you think defines your identity or culture.)¹²
- ☐ What can I learn while working with others from different cultures? And how?
- ☐ How do I know this to be true? Where did I learn this information?
- ☐ When thinking about how you interact with others from cultures that are different from yours, ask yourself “What are my thoughts about this different cultural group?”
- ☐ What previous assumptions and biases do I have of people with other cultures and values?¹²
- ☐ What are these biases based on?

Redressing Power Imbalances¹³

Community Member(s) as Experts

- Cultural humility asks that we see individuals and community groups as the teachers and experts on their culture and community life. By practicing this vision, we can empower the individuals and community groups and help create a sense of ownership in decision-making.

LPCs are Students

- It is important for LPCs to learn about the culture from those who live it. LPCs are partners who have access to resources and can provide advice and input based on their own knowledge.

Listen and Learn

- Throughout the project, LPCs must listen, learn, and consider store manager's best interests.

Mutually Beneficial and Non-Paternalistic Relationships



Client-focused approach

- ☐ Focus on the needs of the store managers
- ☐ Create collaborative and individualized interventions
- ☐ Empower the store managers to direct the intervention and assess what resources they need

During SHI, it will be important to apply a client-focused approach. This type of approach focuses on the needs of the store managers. What do they need in order to improve the sales of healthier items?



Store Managers' Priorities, Goals, and Abilities

The SHI approach creates collaborative and individualized interventions. Remember each store is different. One store manager may want to place marketing stickers on the produce cooler door; another may want to place a sign above the cooler. There is no one right way to implement the store changes and each store can tailor the changes to their needs.

A client-focused approach empowers the store manager to direct the intervention and assess the resources they need. LPCs should offer input when appropriate.

Exchange of Resources and Knowledge

A mutually beneficial relationship examines the similarities and differences between the project goals and the store managers' priorities, goals, and abilities and finds common ground.

Additionally, it exchanges resources and knowledge. LPCs can share information about nutrition and produce handling and provide access to materials such as signs and baskets. The store manager can share information about the inner workings of their store, food distribution, customer base, and much more.





Cultural Humility vs Cultural Competency

Cultural Humility Does Not Require Mastery

Unlike cultural competency, cultural humility does not require us to be competent in others' cultures. We do not have to master a list of different cultural health beliefs and behaviors. Instead, it challenges us to be self-critical and aware of our own culture, and our assumptions of other cultures. Finally, it challenges us to play the role of a student and learn from individuals within the culture that we are working with.



Summary of Cultural Humility

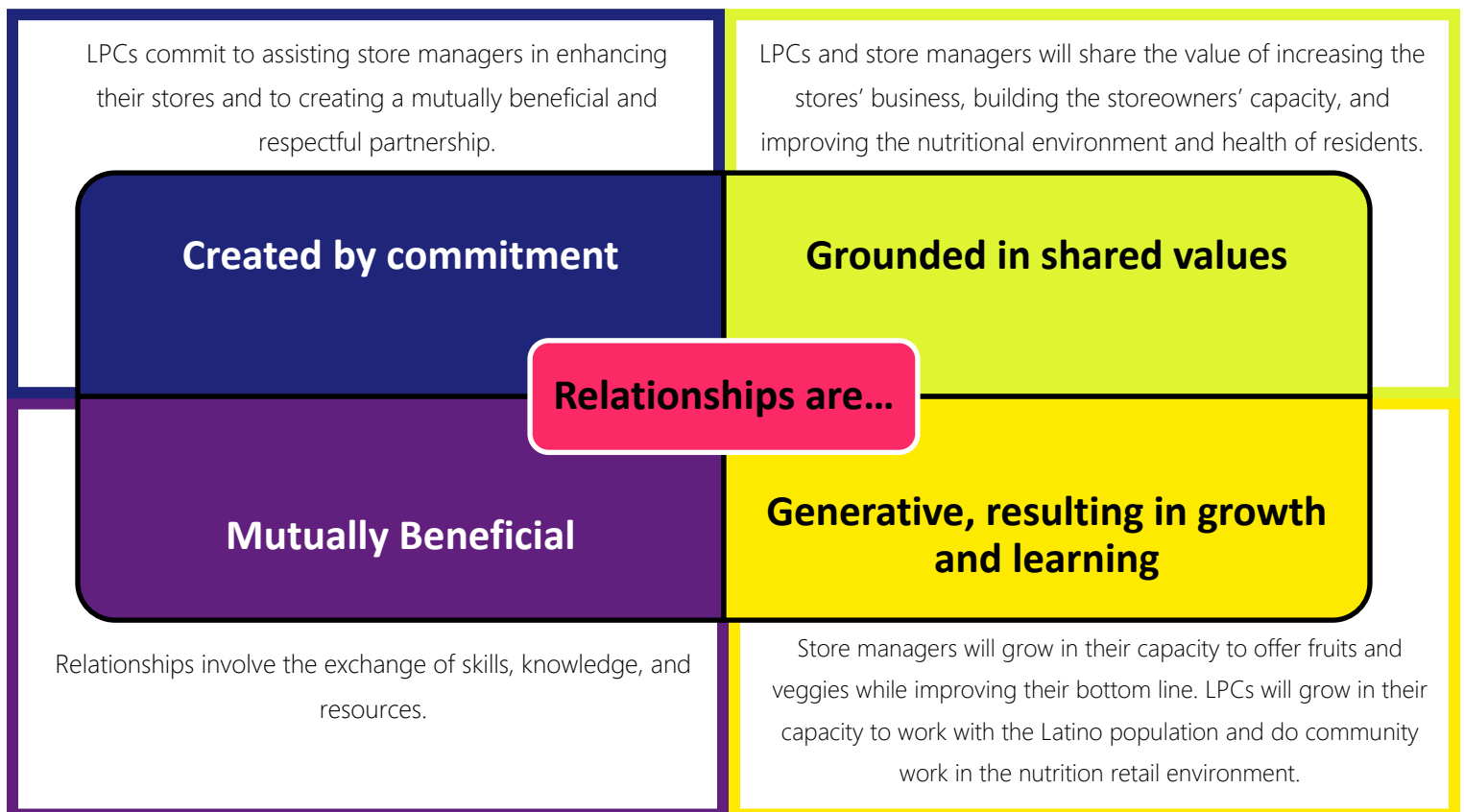
1. Redresses power imbalances
2. Upholds each individual or community group as the experts on their personal culture
3. Challenges us to...
 - ☐ Self-evaluate and critique
 - ☐ Learn from the people with whom we interact
 - ☐ Create mutually-beneficial relationships



Defining Relationships

Why is Relationship Building and Maintenance Important?

In community work, relationships lay the groundwork for collaboration and effective partnerships. A relationship built on trust and a mutual understanding of the need to improve the store's bottom line will lead to achieving program goals. The role of the LPC is to gain the store manager's trust and assist with the necessary changes to boost sales of fruits and vegetables, increasing their profits. At the same time, healthy options are more accessible to customers, improving the nutrition retail environment.





Steps for Establishing Relationships & Building Trust

Steps to Building Relationships:

Make a connection and introduce yourself: Introduce yourself to the store managers and tell them about your connection to the community (i.e. what type of community work you do).

Tell people about yourself: Let the store managers know what your interests are; why you are interested in their store (what is your agenda).

Learn about the store managers and their culture: Do not be afraid to ask appropriate questions. You could ask about: how they got started in the business, what is their vision for the store, how they feel they can improve their store's produce section.

Place yourself in the store managers' culture: If you can, become a regular customer of their store. Attend community events. By taking actions such as these, you can increase your visibility within the community and let others know that you have a genuine interest in their community.

Accept the store managers for the way they are: There will undoubtedly be disagreements. You do not always have to agree on everything. Accept and respect the differences and similarities between you and the manager.

Be persistent: You will not immediately be accepted into the community. It takes time to build trust. Again, be a familiar face, shop in the store, say hello and hold conversations, attend community events, etc.

How to build trust in relationships:^{13,14}

1. Be open and honest

When asked a question, answer it directly. Be willing to disclose your agenda.

2. Listen well

Listen attentively and thoroughly. Make sure the manager feels you are taking the time to listen without judgement.

3. Use humor when appropriate

It is okay to make appropriate jokes and be friendly. Making jokes can also put those you are working with at ease and help them feel more comfortable with you.

4. Speak about tough issues

If issues such as power imbalances come up, or the store manager bring up discrimination in their community, be able to have that conversation with them. Also, be willing to admit when you don't know something and remember ask questions as needed.

5. Participate in the learning exchange

We aim to create mutually beneficial and respectful relationships. Recognize the store manager's knowledge and abilities, and recognize your own.

6. Demonstrate commitment

This is as simple as doing what you say you are going to do. It can also mean being a regular customer, helping align the store manager with additional resources, etc.

7. Appreciate and respect one another

It is important to show appreciation for the store changes and hard work that the store manager does for the SHI program. Make sure to show respect for these efforts and the other work that the manager completes daily to maintain their store by noticing and applauding store successes.





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III. Economic Development





Importance of Economic Development

Why Is Economic Development Important?

The sale of fresh fruits and vegetables is a vital part of grocery stores, averaging between 10-12% of a grocery stores' overall sales.¹⁵ Ten percent of every dollar spent by consumers on fresh produce is profit.¹⁵ While produce sales are about a tenth of overall sales, typically produce represents approximately 17 percent of net store profit.¹⁵ In other words, there are higher profit margins on fresh produce. However, the higher profit margin potential of fresh produce can be dampened by spoilage, employee energy, and transportation costs.¹⁶ One way to support the higher profit potential of fresh produce is through vigilant inventory management and moving perishable products to sale quickly.¹⁷ Shop Healthy campaigns must be designed to activate increased and rapid sales of fresh produce in order to maintain the store's interest in carrying healthy food options.

Pros & Cons of Promoting Health Foods



Facilitators

- + Fruits and vegetables have much higher gross profit margins than many other foods, which are increased when volume of produce in stores increases.
- + Being Supplemental Nutrition Assistance Program (SNAP) certified can raise the purchase of healthy food items in a store and increase profit margins.

Barriers

- Small stores have less capacity to act as retailer, promoter, marketer, interior designer, accountant, and nutritionist. Keep this in mind when planning program activities.
- Produce requires greater energy and time investment in order to realize increased profits.
- Distributors of chips, sodas, and processed bread products will stock and promote their own items. This is often the path of least resistance for storeowners, because it saves on time and extra work on the owners' part.









Marketing and Store Promotions

Marketing and Promotion Capacity of Stores

The majority of immigrant-owned grocery stores in Iowa have limited capacity to market and promote their stores and products. Most are family-run and often only have one owner-manager on duty; even stores with greater sales volume may only have an additional staff person. Thus, owners are responsible for purchasing, stocking, pricing, attending customers, store upkeep, and maintenance. Promotion and marketing is usually the least-developed area of the stores. In part, this is because of the time constraints and lack of expertise of the owners/managers. It is also due to the emphasis placed on personal relationships with customers and understanding their customers' product needs.



In these stores it is common to see:

-  Produce names and prices marked on handwritten notecards and affixed near the product.
-  Storefront windows that act more as a community bulletin board than advertising for what is in the store (i.e. providing information about job opportunities, cars for sale and apartments for rent, or upcoming musical acts).
-  Stores that do not offer coupons or gift certificates (see p25).
-  If stores have a Facebook page, activity is sporadic (many stores that sell prepared foods will have a Facebook page).
-  Stores running daily specials, but these are not promoted outside of the store – in other words you need to be a customer to know what is on special because they are not advertised in media or on the storefront.

SHI provides stores with the necessary materials to create a more uniform feel in the store through the promotional materials associated with the campaign, especially signs directing attention to the fresh produce and the re-usable price cards (Appendix A provides an example order form for program signage and promotional materials previously used in the SHI program).

Use of local English and Spanish language media can raise awareness and support for the campaign through press releases, news stories, and the purchasing of advertisements.

Working with the local Chamber of Commerce can also be fruitful, as they can cross promote SHI to their members and in community publications.

Use these materials as an opportunity to link immigrant-owned retailers with the Chamber.



Program Assistance

Program or Organization	What They Can Offer
Local Level	
Chamber of Commerce	Chamber of Commerce offers to help with promotions, loan funds, printing funds, and façade improvement grants.
City Economic Development Officer	City Economic Development Officer aids with façade improvement grants and revolving loan funds.
SCORE	SCORE aims to provide small businesses owners the support necessary, through mentoring and education for businesses to have the opportunity to thrive.
Iowa State University Extension & Outreach ²	ISU Extension and Outreach can help small business owners create a business plan with the help of other university and city sponsorship.
State Level	
Alliant Energy / MidAmerican Energy	Alliant and MidAmerican provide a program called Small Business Energy Assessment which helps small business owners by customizing a plan for energy and money saving improvements in stores.
Small Business Development Center (SBDC)	The SBDC mission is to support the collaborative economic development of Iowa by providing entrepreneurs and business individual consultation and educational resources necessary to assist their businesses to succeed.
Iowa Center for Economic Success	Iowa Center for Economic Success helps empower Iowans with the potential to succeed in pursuing opportunities for financial success. They do this through their programs of Education + Resources, Credit + Lending, and Advocacy + Networking.
Federal Programs	
Small Business Administration (SBA)	The SBA aids to counsel, assist, and protect the interest of small business concerns, to preserve free competitive enterprise, and to maintain and strengthen the overall economy of our nation.
Certifications	
Supplemental Nutrition Assistance Program (SNAP)	SNAP provides food benefits such as access to healthy foods and nutrition education to low income households. To become authorized to accept SNAP benefits you can complete an online application, it takes as little as 15 minutes.
Women, Infants & Children (WIC)	WIC is a supplemental nutrition program that gives access to healthy foods to pregnant women, children & infants under the age of 5, and women who are breastfeeding. To become authorized to accept WIC, businesses must review the appropriate guidance document prior to requesting an application. One can request an application by contacting the State WIC office.



Applying for SNAP Benefits as a Grocery Store

How to Apply to Accept SNAP Benefits as a Grocery Store¹⁸

If a store is not SNAP/EBT registered, helping store managers to apply for these programs may be beneficial for their store. The below graphic explains more about the SNAP program. Step-by-step instructions on how to apply for the SNAP/EBT program can be found at the SNAP website: <https://www.fns.usda.gov/snap/retailer-apply>.



Supplemental Nutrition Assistance Program (SNAP)

- Also known as "food stamps" or "estampillas."
- Government program that provides qualifying individuals and families access to benefits that can be used to purchase nutritious food.
- SNAP recipients receive their benefits via an EBT card.



Electronic Benefits Transfer (EBT) card

- Similar to a debit card, but instead of deducting purchases from a checking account, a purchase is deducted from the recipient's government benefits account.
- Grocery stores must apply to qualify to accept SNAP benefits. When a store is accepted to be SNAP certified, the government sends the store details about getting the EBT machine. A store cannot accept customers using SNAP without an EBT machine .

Determining if store owner is also the building owner

Whether or not the store owner also owns the building can have a big impact on being able to qualify for business development assistance. If they do own the building, try to determine if they still owe money on the building:

- ❑ Do they have a mortgage (una hipoteca del banco)?
- ❑ Are they buying the building on contract (por contrato)?
 - Buying a building on contract means they do not have the building title and are making payments to the title holder until it is paid off.
 - If the owner is buying on contract, businesses are not eligible for many state and federal building improvement loans.

Businesses that own their buildings are more likely to be convinced to make interior and exterior design changes to enhance lighting, energy savings, weatherization, product placement, and electrical upgrades.

Coupons, Food Tastings, and Store Promotion

One way to enhance the promotional capacity of stores is through the creation of specific SHI coupons designated for use on fresh produce. First ask and verify that store owners would be willing to accept coupons created for the program.

When implementing coupons in stores:

1. Explain that coupons can bring new customers into the store.
2. Decide on an agreed upon expiration date for use of the coupon.
3. Make sure the store is compensated for the total price of the coupons – typically in five dollar increments. So, for instance, the local contractor could purchase \$250 worth of coupons (a total of 50 coupons) good for use in the store during the three months of implementation.
4. The store owner agrees to honor the use of the coupons when applied by the customer toward the sale of fresh produce.
5. In order to reinforce healthy habits, coupons created for the implementation of SHI are distributed to potential store customers during health related activities as an incentive for participation or as a premium for having completed a class. Examples of these activities include, but are not limited to:



Coupons could be distributed during SHI food tastings for individuals who try the prepared food samples.



Iowa State University Extension food and nutrition specialists could disburse coupons to Latino participants who complete the FNEP classes or other curriculum.



Hospitals could offer coupons to people who participate in diabetes prevention classes.



WIC clinic attendees could receive coupons for well child check-ups.



Coupons could be used in conjunction with healthy living programs that reinforce SHI messages.

6. If possible, work with a food and nutrition specialist or dietitian from Extension or a local health care provider who will be offering the coupons to his or her clients for participation in their program. These nutrition specialists can use the food tasting as an opportunity to recruit new program participants who will then become the recipient of the store coupons upon completing the class. This gets their clients back into the store and reinforces the healthy habits being promoted in wellness classes and in the SHI campaign.

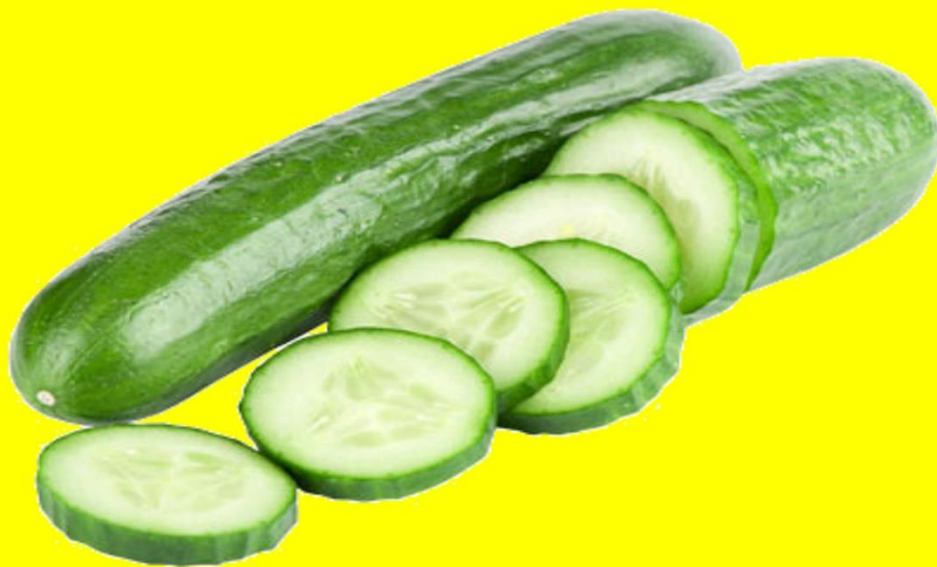




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IV. Program Implementation

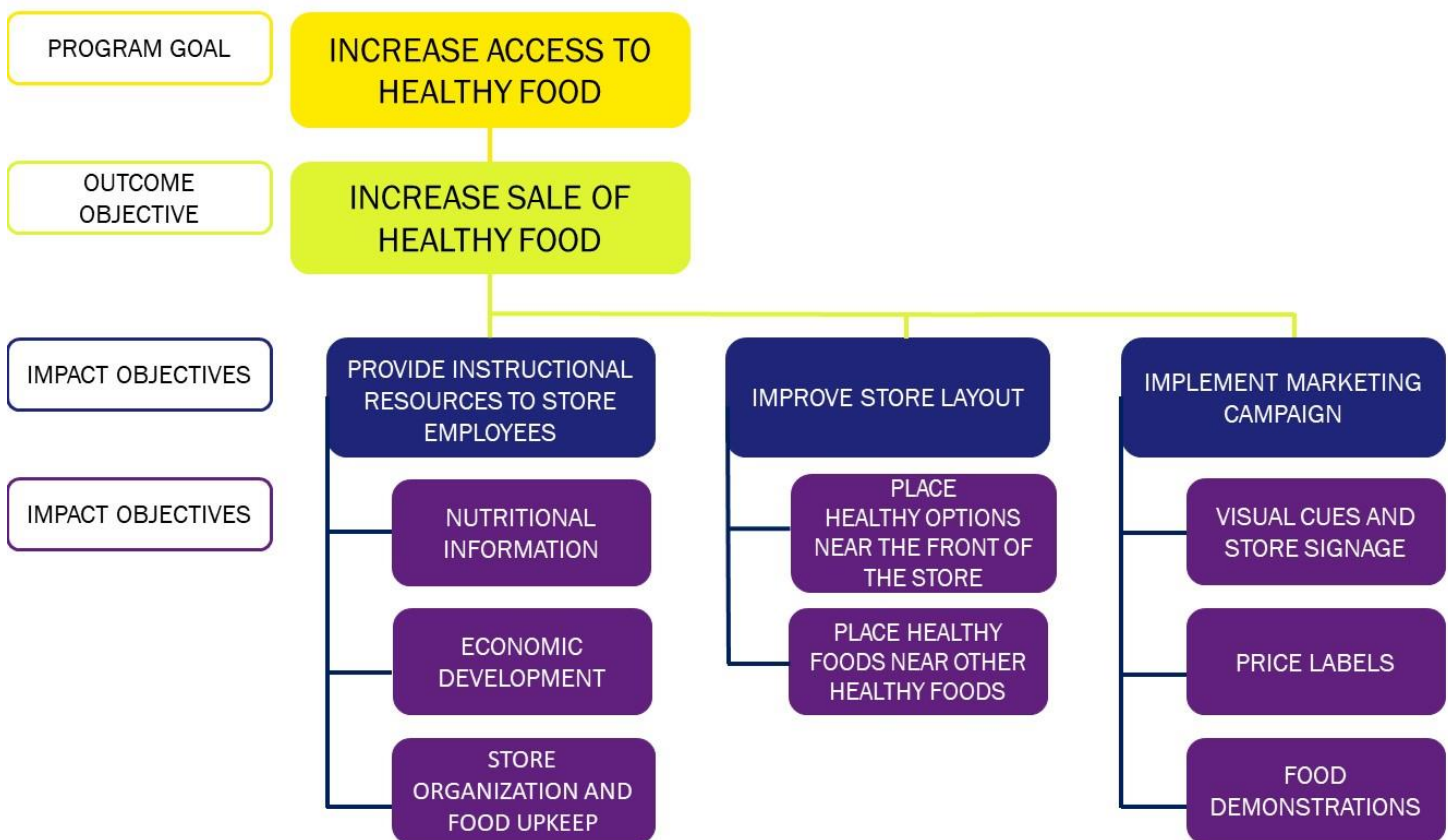




Program Outline and Timeline

Before beginning to discuss the implementation of the SHI program, a brief recap the program goals and objectives is provided below:

Program Outline



The actual implementation of SHI was designed to take place over a five month time period. Prior to implementation, store manager trainings are conducted and signed store commitment forms are obtained from participating retailers. More specific information about the timeline and activities will be provided later in the toolkit starting on page 32.



Store Recruitment



Included in this section are the major steps of store recruitment.

1. **Identify eligible stores.** For the purpose of SHI, eligible stores include tiendas that sell fresh produce.
2. **Contact stores and explain the program.** LPCs suggest store layout models and marketing strategies that stores can choose to implement. See recruitment flyer example found in Appendix A.
3. **Obtain store commitment forms.** Retailers who decide to participate should sign the Store Commitment form (Appendix A). More than one visit may be required to recruit retailers, allowing them more time to consider participation. Helpful tips for keeping managers engaged and getting managers to sign this form can be found in the table below.

Stay Persistent	<ul style="list-style-type: none">• Some stores might be hesitant but are still interested.
Focus On The Benefits	<ul style="list-style-type: none">• Stores receive incentives for participating in SHI which will help stores by increasing their revenue, and help their community build healthier habits.
Answer Any Questions	<ul style="list-style-type: none">• If you do not know the answer, write it down in front of them and tell them you will look into it and let them know the answer as soon as possible.
If they are still not signing the Store Commitment Forms	<ul style="list-style-type: none">• If they are clearly not interested, or their plans for the store will change, thank them for their time and encourage them to contact you if they would like to partner in the future.

When they do sign the Store Commitment Form, show excitement!

4. **Explain Pre-assessments.** After the stores commit to the program, explain the pre-assessments and assessments that will occur before, during, and after the program. Highlight that some assessments will be completed before any store changes take place. Be clear about what will happen during each visit, the time frame of the program, and who will be visiting.

Communication is Crucial

Things to schedule right away:

- ☐ NEM-S Latino Audit (example report found in Appendix B)
- ☐ Manager Interview (Appendix C)
- ☐ Customer Survey (Appendix D)



Pre-Assessments

*Pre-assessment items will be discussed in further detail in the evaluation portion of the toolkit. Basic information about the pre-assessment options is included here to help explain them to store managers.

NEMS-S Latino Audit*



- ❑ The NEMS-S measurement tool is a widely used instrument for assessing a store's environment in regards to availability, price, and quality.
- ❑ It can be misleading to label a nutritional environment as deficient (ex: a food desert). Latino customers may consume other healthful foods that are not always reflected in the "mainstream" standards of healthy eating.¹⁹
- ❑ In a few Latino communities, the application of the original NEMS-S may not consider many of the available nutritious and healthy foods that are preferred by Latino customers.¹⁹
- ❑ In turn, it is not helpful if Latino customers do not desire or consume the common American foods that are available.¹⁹
- ❑ Please contact Dr. Donna M. Winham, DrPH, RD, LD, MCHES for further information on the NEMS-S Latino (dwinham@iastate.edu).

Customer and Manager Interviews*

- ❑ Covers basic information about the customers, employees, and store practices.
- ❑ The customer interview focuses on gathering information about food purchasing habits and opinions of customers on store strengths and areas for improvement.
- ❑ The manager interviews provides information on food and beverage distribution services within stores as well as planned store improvements and manager self-efficacy in implementing healthy retail initiatives.
- ❑ Please contact Dr. Barbara Baquero, MPH, PhD for further information on Customer and Manager Interviews (barbara-baquero@uiowa.edu).



Purchasing/Sales Data*

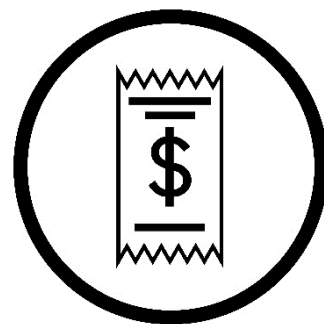


This is part of the pre/post assessment of purchases/availability of healthy food options at the beginning, during each month, and at the end of the SHI program.

Stores collect information differently. Some store managers may not be comfortable sharing certain purchasing/sales data with you. With this in mind, determine what type of data is best to collect from your store and what information the manager is comfortable with providing (Purchasing Data Collection Agreement form in Appendix E).

The purchasing/sales data types below are listed from ideal, or most complete, to the least complete:

- ☐ Sales log: this is the total sales of the store.
- ☐ Distributor/inventory purchases: this is either the receipt from their distributor purchases, or results from their inventory. Although it's not a direct measure of how much people are buying in the store, it can be assumed that if the store manager is purchasing more of healthy items, there is a demand for them. If a decrease is seen, it can be assumed that there is less of a demand for these items.
- ☐ Customer receipts: If store manager has copies of customer receipts we can collect them and see what people are purchasing.
- ☐ Implementation team observing purchases: This requires your team to visit the store and observe what customers are shopping for. This gives some insight into purchases, but the usefulness of the information gathered is limited since it would only cover a few hours or customer purchases each week, and may not reflect purchases throughout the week. It is best if store managers provide the other types of data, with this method being a last resort.



But what if the store doesn't collect this information?

They should! This type of information helps store managers track their inventory, what their revenue is, gives descriptive information on their store's products like what is most/least popular, and how long items last on the shelves. Discussing the collection of this type of data is a great opportunity to talk to the store managers about future economic development opportunities. If stores do not collect any sales or purchasing information, ask managers to start keeping track of their sales in a notebook or computer, and help connect them with someone to provide more information on keeping track of sales.

Store Pictures*



- ☐ Store pictures help to provide visual representation of store changes that occur throughout the program.
- ☐ Take pictures of any areas where current fruits and vegetables exist or where planned store changes are expected to happen.



Store Training Summary

Scheduling Store Training Sessions with the Store Manager:

After pre-assessments of the store is completed, schedule training sessions with store managers to go over the Store Manager Training guide (Appendix F & G). This training should be completed before any store changes are made.

Before the training follow these easy steps:

1. The curriculum for the store manager trainings can be found in Appendix F (English version) and Appendix G (Spanish version). Review this training before meeting with store managers.
2. Let managers know what to expect. They will be walking around the store and are expected to participate in hands-on activities. If this will not be possible during store hours, suggest times before or after hours.
3. It is estimated that 3 hours is needed to go over all the topics in the Store Manager Training guide.

Work with the store managers to determine a schedule for the training session(s) that would work best for them. Use the “calendar” sheet to mark down session times (Appendix H).
4. Attempt to schedule the training session(s) within a 4-week timeframe. Once the date(s) is/are scheduled, make sure everyone involved in the project knows when these will occur.





Implementation Plan

Implementation Plan

Implementation of SHI will occur in the time span of five months (Figure 4). Program activities have been identified to promote healthy food purchasing in small Latino retail venues commonly referred to as tiendas.

These activities, informed by the NEMS-S Latino Audit, will increase access to healthy foods and beverages through manager training, storewide structural changes, and marketing strategies.



Local Public Health Agencies (LPHAs) or local project coordinators (LPCs) will recruit stores and will be responsible for providing ongoing technical support throughout the implementation process. This is a sustainable program due to the minimal resources needed for completion.



Figure 4-SHI Simple Activity Timeline

Activity Timeline

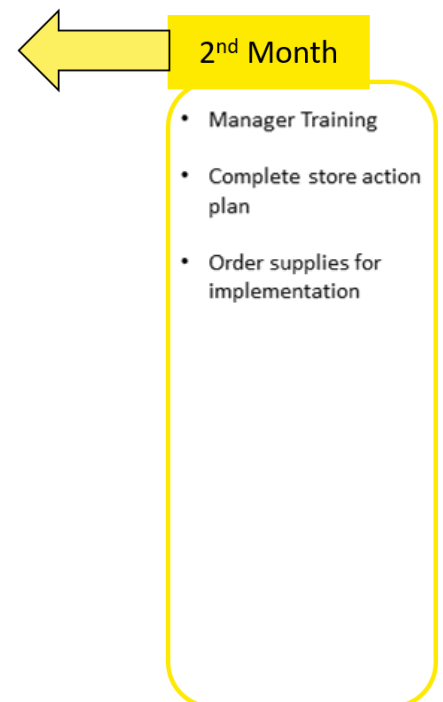


1st Month: before anything else can be completed by the SHI program in the intervention stores, LPCs must obtain signed store commitment forms (Appendix A) from store managers. Once the commitment forms are signed, preliminary store assessments should be conducted, including the NEMS-S Latino Audit, manager interviews, and customer interviews (information collected by University partners). Data gathered from these assessments and can be used to help identify individual store assets and needs. This information can then be helpful in shaping and adapting the SHI program to best suit the intervention stores.

Additionally, during this month. Local Project Coordinators (LPCs) will collect the first round of purchasing/sales data and take before pictures of store areas and submit these files to IDPH. All of the data collected during the first month of the program, will help to establish a baseline or pre-intervention measurement, which is important to help measure the effectiveness of the SHI program—it will help to explain where the intervention stores started before the program began.

2nd Month: contractors will hold one 3 hour (or three 1 hour) session(s) with store managers. Sessions should be scheduled once commitment forms are signed. Items discussed in the training tool reflect options available for in-store changes. This is an opportunity for LPCs and store managers to walk around in the store, discuss capacity for changes, and begin to identify barriers and obstacles to implementing changes.

The training guide (Appendix F and G) provides information for store managers and gives an introduction to basic healthy retail principles such as store layout changes, store marketing, and the proper care of healthy foods. These principles can help to guide store changes throughout the rest of the SHI project. Once these trainings are completed, LPCs should complete store action plans (Appendix K) with managers and begin to order supplies for implementation of the program.



3rd Month

- Begin structural store changes
- Begin marketing strategies
- Offer store demonstration and complete logs
- Collect F/V purchasing information

3rd Month: store managers will begin reorganizing the store to promote sales of healthy produce and non-sugary beverages. Organizing healthier options together near the front of the store and in noticeable, attractive locations throughout the store will increase visibility and increase purchasing of produce and other healthy items. Structural change activities are outlined in the training sessions.

Marketing activities such as labeling and placing signs should be completed in the last third of the intervention as highlighted in the month 3 diagram, after the store has been rearranged and customers have become more aware of the healthy options available. Labeling activities are outlined in the training sessions.

Month 3 is also the first month where food demonstrations can begin to be offered. Sometime between month 3 and the conclusion of the project in month 5, LPCs should complete at least 2 sets of food demonstrations (2 demonstrations at each store). At the end of month 3, LPCs should collect another set of purchasing/sales data and submit these documents to IDPH.

4th Month: LPCs will provide technical assistance to the store managers to help them maintain and continue to improve the store layout, marketing, and other structural changes within the store. One of the 2 food demonstrations per store could be done during this month. LPCs will collect purchasing/sales data and send to IDPH.

4th Month

- Provide technical assistance to stores
- Maintain store and marketing changes
- Offer store demonstration and complete log
- Collect F/V purchasing information

5th Month

- Provide technical assistance to stores and marketing changes
- Complete post action plan
- Offer store demonstration and complete logs
- Collect F/V purchasing information
- Store manager interviews
- Customer interviews
- NEMS-S Latino Adaptation

5th Month: All follow-up evaluations are to be completed by the end of month 5. Evaluations include follow-up store pictures, post action plan, any remaining food demonstrations with corresponding logs, final purchasing/sales data, store manager interviews, and follow-up NEMS-S Latino Audit. These activities are further explained in the Evaluation and Monitoring section. Continued technical assistance will be provided to the stores as needed.

Below, the Shop Healthy Iowa At-A-Glance Table further explains the activities timeline for the 5 months of the SHI program. Activities are color coded with a corresponding key indicate the division of tasks among the partners involved in the program.

to



Shop Healthy Iowa At-A-Glance Table

	Month 1	Month 2	Month 3
	<p>Upload store commitment forms and before pictures ☼</p> <p>Pass on store contact information to U of I/introduce partners to managers as needed ☼</p> <p>Collect F/V purchasing information from participating store-upload to Iowa Grants (IG)☼</p> <p>Send data to U of I 🌿</p> <p>NEMS-S Latino Adaptation ♦</p> <p>Store manager interview and customer surveys ♦</p> <p>Data analysis ♦</p> <p>Participate in bi-monthly ZOOM meeting **</p>	<p>Manager Training - determine signage and store supply needs ☼</p> <p>Complete store action plans and upload to IG (at the end of month 2) ☼</p> <p>Send signage needs to IDPH – Due ASAP after 1st training session ☼</p> <p>Order store supplies, baskets, displays for month 3 implementation ☼</p> <p>Print signage 🌿</p> <p>Data analysis ♦</p> <p>Participate in bi-monthly ZOOM meeting 🌿</p>	<p>Begin structural store changes ☼</p> <p>Begin marketing strategies ☼</p> <p>Offer food demonstrations (2 over 3rd, 4th, or 5th month) and complete logs ☼</p> <p>Collect F/V purchasing info – upload to IG ☼</p> <p>Send data to U of I 🌿</p> <p>Data analysis ♦</p> <p>Participate in ZOOM meeting 🌿</p>
Month 4	<p>Provide TA ☼</p> <p>Offer store demonstrations (2 over 3rd, 4th, or 5th month) and complete logs ☼</p> <p>Collect F/V purchasing information – upload to IG ☼</p>		<p>Maintain store and marketing changes ☼</p> <p>Send data to U of I 🌿</p> <p>Data analysis ♦</p> <p>Participate in ZOOM meeting 🌿</p>
Month 5	<p>Provide TA to maintain store and marketing changes ☼</p> <p>Complete post action plan – due Month 5 ☼</p> <p>Collect F/V purchasing info –upload to IG ☼</p> <p>Offer food demos (2 over 3rd, 4th, or 5th month) and complete logs ☼</p>		<p>Send data to U of I 🌿</p> <p>Store manager interview and customer surveys ♦</p> <p>NEMS-S Latino Audit ♦</p> <p>Participate in ZOOM meeting 🌿</p>

KEY:

LPC: ☼

IDPH: 🌿

U of I: ♦

All: **

Table 1: The SHI At-A-Glance table is a summary and a month-by-month timeline of all the evaluation components of the SHI program. The key at the right of the table identifies the responsibilities of each task in the SHI program assigned to their corresponding agencies.



Compre Saludable
Shop healthy
Iowa



V. Monitoring & Evaluation





What is Evaluation

What is Evaluation?^{20,21}

Evaluation is used to critically examine a program through the gathering and analyzing of various types of information about the program. This information, or data, should be gathered on the activities completed for the program, the overall characteristics that make up the program, and the level to which the overall goals and outcomes of a project are reached. By collecting this information, a program's effectiveness can be determined, judgements about a program can be made, and future program decisions can be guided taking a program's effectiveness and corresponding judgements into consideration.

As mentioned earlier, the intervention component of SHI will focus on environmental and marketing changes. The evaluation component will help to determine how the intervention activities impact the overall outcome objective of increased sales of healthy products in stores. Increased sales will demonstrate achievement of SHI's overall goal of increasing access of healthy foods among the Latino population.

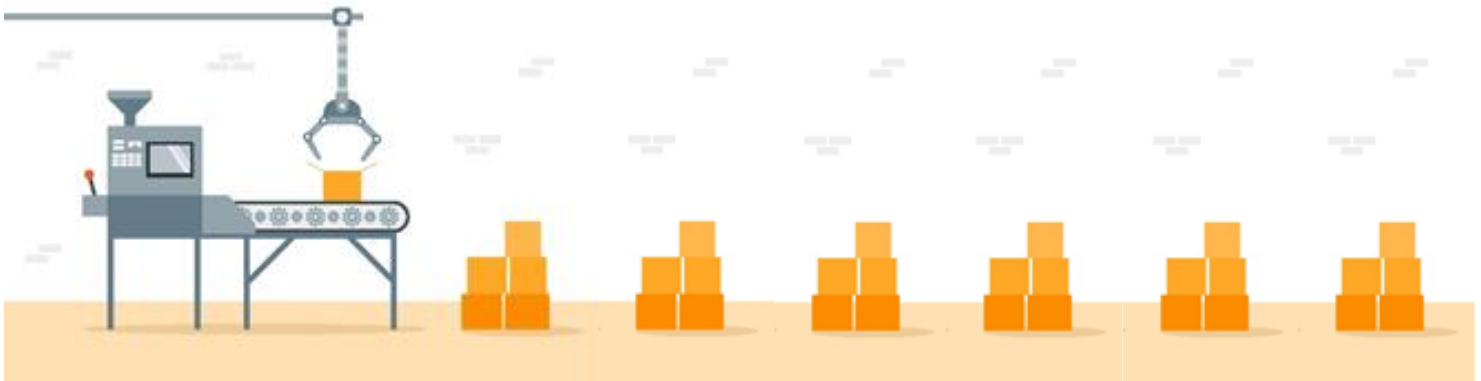
Various types and methods of evaluation exist; each are useful at different times during the lifecycle of a program. Each type provides distinct beneficial information and each can be useful in a variety of ways. For the SHI program, several varieties of process, outcome, and impact evaluations are conducted to ensure a comprehensive evaluative picture of the program can be seen.



Process Evaluation²²

Process evaluation is used to determine to what extent program activities are executed as described in the program plan. This type of evaluation is collected throughout a program's implementation and helps to see what the intervention looks like in actual practice. As described in by the SNAP-Ed Guidance, process evaluation can help check for fidelity within a program to see if it was implemented as intended. It can guide the decision of whether or not a program should be continued, changed, or eliminated. Process evaluation can help to answer questions like:

- ☐ Which intervention activities were completed?
- ☐ When and where did the program activities take place?
- ☐ Were these activity components completed as intended?
- ☐ If program activities were altered, what changes were made and why?
- ☐ How many people took part in the activities and who were the participants?
- ☐ Did the participants of the activities match the target population of the program?
- ☐ What resources were needed to complete activities? What other resources may be needed to make the program more effective?
- ☐ What were the barriers/facilitators to the program activities being conducted?



Outcome Evaluation^{22,23}

Outcome evaluation is used to measure the degree to which intended outcomes of a project occur among the target population. It cannot provide definitive evidence that the outcomes observed are from the intervention specifically, but it can help to determine if the anticipated group changes happen in conjunction with the intervention. In other words, this type of evaluation measures the changes that can be attributed to the program being implemented. Outcome evaluation can help to answer questions like:

- ☐ Were the objectives of the program achieved?
- ☐ What were some of the outcomes of the program (can be both intended and unintended outcomes)?
- ☐ What were the beneficial (or potentially adverse) effects of the program on the participants?
- ☐ Did participants of the program experience changes in knowledge, attitudes, beliefs, or skills?
- ☐ Is prolongation of the program's implementation and the continuation of allocating needed resources justified?



Impact Evaluation^{22,23}

Impact evaluation is used to draw a cause and effect conclusion and decide authoritatively if the outcomes observed in an intervention are a result of the intervention itself.³² It can determine the effectiveness of a program in achieving its ultimate goals. These types of evaluation items are gathered after a substantial period of time has passed since the intervention was completed. They help to assess the overall impact of a program on the target population. Impact evaluation can help to answer questions like:

- ☐ Was the goal of the program achieved?
- ☐ Were long-term behavioral or health outcomes different in the population from baseline measurements that were taken?
- ☐ What were the lasting changes that the program had on the target population?



Why Evaluate Shop Healthy Iowa?²⁰

SHI can reap multiple benefits by having a comprehensive and thorough evaluation. Through evaluation, improvements in program design and implementation can be made to ensure a program is as effective as possible. Additionally, evaluation can help to determine a program's success or advancement in making intended changes in a target population. Improving program effectiveness and gaining knowledge about the program's success are both crucial in maintaining positive relationships with the public, boosting the morale of staff working on the program, and in maintaining support from funders.



How are we evaluating Shop Healthy Iowa?

The evaluation of SHI is made up of multiple components that are tailored to the program and are based on scientific evidence. The tools are inclusive, with multiple types of evaluative tools being used throughout and after the program's implementation. They are also replicable, where using the guidelines offered below, future SHI implementers can conduct the evaluation components with limited outside guidance needed.

Process Evaluation of Shop Healthy Iowa

Food Demonstration Logs

Two sets of food demonstrations should take place sometime during the 3rd, 4th, and/or 5th months of the program. Food demonstrations are a great way get customers to try new products and recipes. The recipes used contain healthy ingredients offered in the store. Recipes used in food demonstrations for SHI are provided by ISU Extension. Examples of food recipes to be used can be found in Appendix I. A short food demonstration log (found in Appendix J) should be completed at each food demonstration site. More than 2 food demonstrations can be offered, but ensure that each store in the program receives the same amount of food demonstrations throughout the 3 month timeframe.



Performed by: Local Project Coordinators

Analyzed by: University of Iowa

Timeline:

The food demonstrations will take place sometime during the 3rd, 4th, and/or 5th months.



Oral Reports in Partnership Meetings



In monthly coordinator meetings between IDPH, U of I, LPCs, and other SHI partners, process indicators will be a standing agenda item. A standard list of questions will be asked during these meetings, which will pertain to the processes and actions taken for the SHI program. The LPCs will give a brief oral summary of the accomplishments and complications that they have faced in their stores. This will serve as a summary of the strides that each community has taken in implementing the program as well as help identify problems that have arisen along the way.

Performed by: Local Project Coordinators

Analyzed by: University of Iowa and IDPH

Timeline:

Updates will be taken monthly during scheduled meetings in the 3rd, 4th, AND 5th months.



These meetings will occur two times a month in both the 1st month AND the 2nd month of the program.

Pictures of Store Improvements

Structural and visual changes can alter the community's perception a store. Keeping track of these structural changes by taking pictures before and after changes are made can help to capture the visual changes. At the beginning of the program, before any manager trainings are completed, baseline pictures should be taken. Pictures should also be taken at the end of the program. Ideally, pictures should be taken throughout the implementation period any time a structural change is made. It may also be helpful to mark in the activities calendar when pictures were taken and make notes to help identify important characteristics of the pictures. Pictures should be labeled with the date they were taken, the name of the store where they were taken, and a short description of the corresponding image.



Performed by: Local Project Coordinators

Analyzed by: University of Iowa and IDPH

Timeline:

Baseline pictures are taken during the 1st month of the program, before the manager trainings begin.

Evaluation pictures are taken in the 5th and final month of the program.

Month 1

Month 2

Month 3

Month 4

Month 5

Additional sets of pictures can be taken throughout the program when structural changes are made.



Action Plans

At the completion of the manager trainings, each store manager who completed the trainings should fill out an Action Plan (found in Appendix K). This action plan helps the LPC and the manager come to an agreement about which store layout and marketing changes will be implemented during the intervention. The follow-up Action Plan should be completed at the end of the program.



Performed by: Local Project Coordinators

Analyzed by: University of Iowa

Timeline:

The store manager from each store, with the LPC, should complete the Action Plan document after the final manager training session is completed at the end of the 2nd month of the program.

The follow up Action Plan should be finished before the conclusion of the 5th month of the program.

Month 1

Month 2

Month 3

Month 4

Month 5

*Activities Calendar and Store Notes

The program calendar (found in Appendix H) is an **OPTIONAL** evaluation activity and can be used by the LPC to record any interaction or activity that was completed at the intervention stores for the SHI program. The name of the store and the person who received LPC correspondence can be recorded along with an estimated amount of time the LPC spent on the activity and brief notes of what was discussed/accomplished during the meeting. Information that cannot fit into the calendar boxes provided can be written in the lines below. Additional sheets of paper can be used and additional calendars can be printed if more room is needed to write these notes. It is recommended to have separate program calendars for each store to keep the implementation of the program at each store separate.



Performed by: Local Project Coordinators

Analyzed by: University of Iowa

Timeline:

Updated throughout the implementation of the SHI program whenever correspondence with store manager takes place or other SHI sponsored activity takes place in a participating store. Therefore, this can be completed over the entire 5 months of the program.

Month 1

Month 2

Month 3

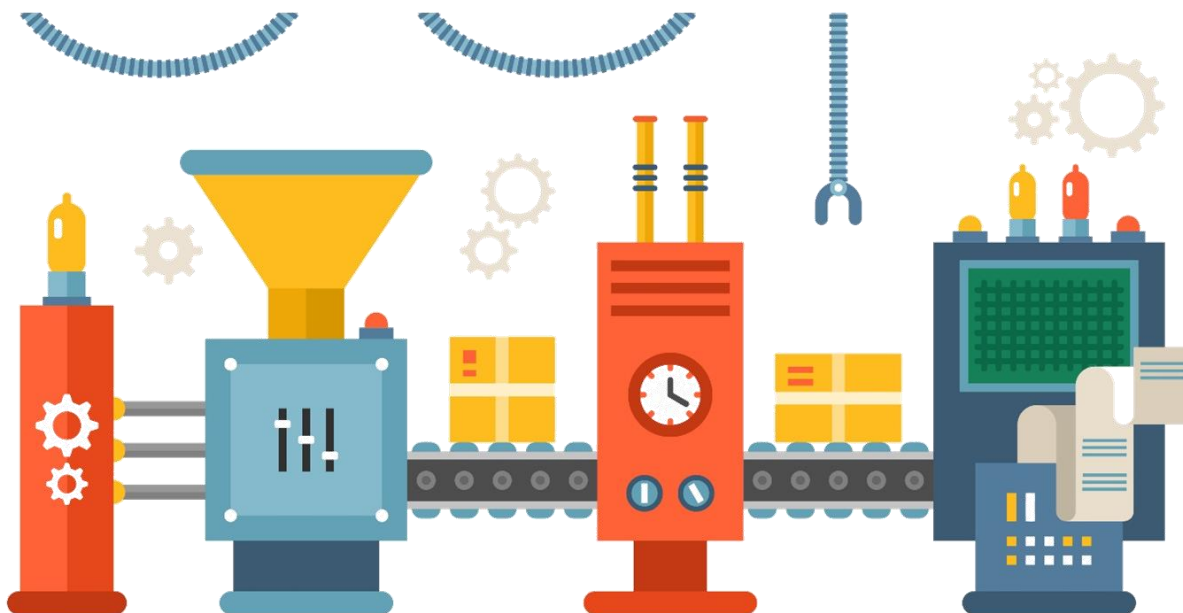
Month 4

Month 5

Process Evaluation Summary			
Evaluation Type	Performed By	Timeline	Analyzed By
Food Demo Logs (<i>n=at least 2 per store</i>)	Local Project Coordinators	· During months 3, 4, 5	University of Iowa
Oral Reports in Partnership Meetings (<i>n=7 meetings</i>)	Local Project Coordinators	· 2 meetings in month 1 · 2 meetings in month 2 · 1 meeting in month 3 · 1 meeting in month 4 · 1 meeting in month 5	University of Iowa; Iowa Department of Public Health
Pictures of Store Improvements (<i>n=at least 2 sets per store</i>)	Local Project Coordinators	· Month 1 · Month 5 * Additional pictures in month 3 and 4 (OPTIONAL)	University of Iowa; Iowa Department of Public Health
Action Plans (<i>n=2 per store</i>)	Local Project Coordinators	· Month 2 (after manager training) · Follow up month 5	University of Iowa
*Activities Calendar and Store Notes (OPTIONAL)	Local Project Coordinators	· Throughout all 5 months as document is helpful	University of Iowa

Table 2: A review of the SHI process evaluation components.

*Indicates that this activity is optional



Outcome Evaluation of Shop Healthy Iowa

Manager Interview

The manager interview (found in Appendix C) provides valuable information about each store manager, the customers who shop at each store, and other characteristics of the store such as social demographics and perceptions of healthy food sales. The manager interview will be given by the University of Iowa staff at the beginning of the intervention and at the very end of the program. The follow-up assessment can be especially helpful in better understanding what the store manager felt were the most successful components of the intervention and which components were less impactful to their store.



Performed by: University of Iowa

Analyzed by: University of Iowa

Timeline:

The baseline interview should be completed during the 1st month of the program.

The follow up interview will take place at the end of the 5th month of the program.

Month 1

Month 2

Month 3

Month 4

Month 5

Manager Training Survey

The manager training survey (found in Appendix C, Section E) measures the impact of the manager trainings on the manager's knowledge and opinions of the training provided by the SHI program. This evaluation component can help to determine the effectiveness of the educational component of the program. This will be given in combination with the follow up Manager Survey.



Performed by: University of Iowa

Analyzed by: University of Iowa

Timeline:

Month 1

Month 2

Month 3

Month 4

Month 5

Given along with the follow up Manager Survey in the 5th month of the program.

Customer Survey



The customer intercept survey (found in Appendix D) measures customer demographics, shopping/purchasing behaviors, and opinions. Additional questions about store layout and store changes about the SHI program will also be asked. University of Iowa staff will complete as many customer intercept surveys as possible during their data collection site visit during the 1st month of the program. Follow up intercept surveys will be completed in a similar fashion during the 5th month of the program.

Performed by: University of Iowa

Analyzed by: University of Iowa

Timeline:



Outcome Evaluation Summary			
Evaluation Type	Performed By	Timeline	Analyzed By
Manager Interview (<i>n=2 per store</i>)	University of Iowa	<ul style="list-style-type: none"> Month 1 Month 5 	University of Iowa
Manager Training Survey (<i>n=1 per store</i>)	University of Iowa	<ul style="list-style-type: none"> Given with the Manager Interview in month 5 	University of Iowa
Customer Survey (<i>n=as many as possible during U of I site visits</i>)	University of Iowa	<ul style="list-style-type: none"> Month 1 Month 5 	University of Iowa

Table 3: A review of the SHI outcome evaluation components.

Impact Evaluation of Shop Healthy Iowa

NEMS-S Latino Audit

NEMS-S Latino is an environmental audit. Environmental audits measure the availability and condition of food items in stores as well as help to record the overall condition of a store's environment.²⁴ For the SHI project, a newly developed tool, NEMS-S Latino will be used. This tool is based on the NEMS-S (Nutrition Environment Measures Survey), but includes measurements relevant to Latino stores that are not included in the traditional NEMS.¹⁹ This audit will take place at baseline during the 1st month of the program and again at follow-up during the 5th month of the program's intervention after all structural changes have been made. An example report is given in Appendix B.



Performed by: Iowa State University

Analyzed by: Iowa State University

Timeline:



Purchasing/Sales Data

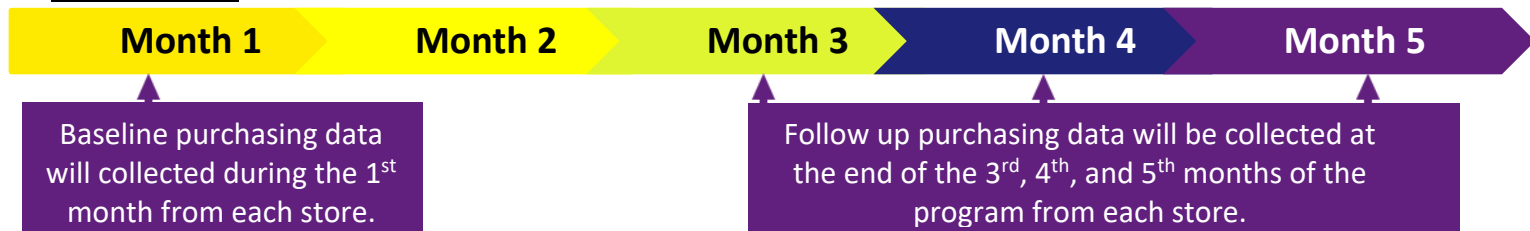


Depending on a store's capacity, various types of sales data on healthy foods may be collected from each store. An agreement must be determined with each store manager on how this information will be gathered/provided. The different types of data (sales log, distributor/inventory purchases, customer receipts, implementation team observation of purchases) that can be collected is mentioned on the data collection agreement form found in Appendix E. This purchasing data will be collected by the LPC during the 1st month of the program as well as at the end of the 3rd, 4th, and 5th months.

Performed by: Local Project Coordinators

Analyzed by: University of Iowa

Timeline:



Impact Evaluation Summary

Impact Evaluation Summary			
Evaluation Type	Performed By	Timeline	Analyzed By
NEMS-S Latino Audit (<i>n=2 per store</i>)	University of Iowa	<ul style="list-style-type: none">· Month 1· Month 5	University of Iowa
Purchasing/Sales Data (<i>n=4 per store</i>)	Local Project Coordinators	<ul style="list-style-type: none">· Baseline during month 1· Follow-up at the end of month 3, 4, AND 5	University of Iowa; Iowa Department of Public Health

Table 4: A review of the Shop Healthy Iowa impact evaluation components.



Summary of the SHI Evaluation Program

Summary of the Shop Healthy Iowa Evaluation program

Overall, the SHI program has a multitude of evaluative components that contribute to a thorough and comprehensive collection of evaluative material. A checklist of duties and tasks assigned to the partners involved in the SHI program is found in Appendix L.

By including process evaluation components, SHI can improve program effectiveness and understand many of the nuances of the program implementation that took place. Through outcome evaluation measures, data about the educational component of this program as well as the opinions, attitudes, and knowledge of both store managers as well as customers can be assessed and analyzed. Impact evaluation tools help to see the broader picture of the program through comprehensive store audits of the food environment at the studied stores as well as the purchasing data which can help to see if an increase in healthy product sales and availability were seen because of the program.

VI. Acknowledgements

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Graphics and content revision were completed by Bucklin, R., Santana, X., Chavez, C. & Huynh, A.

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Shop Healthy Iowa Store Manager Training

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